Welcome to the first meeting of the ......
The purpose of the Circle is to share information on HR operations to enable and empower all members of our UVA HR Community.

Together, we will focus on:

- Relevant business operational items based on University schedule and/or on UVA HR Calendar
- Implementation of HR processes based on new or revised policy or legislative initiatives
- Updates from S3, the New Strategic HR Leadership Meeting
- Updates from the Ufirst project regarding the latest in UVA HR transformation activities
Members of the Circle are expected to:

- Make meeting attendance a priority
- Be knowledgeable of school/organization mission and business/academic operations and apply information received during the meeting to facilitate success in HR operations
- Participate in workshops to ensure clarity of context and understanding of solution
- Provide perspective to improve proposed solutions via HRCC feedback mechanisms
- Convey meeting highlights to colleagues and discuss to ensure understanding
- Be collaborative and solution-oriented with a focus on the best interest of the entire University
The purpose of the S3 - Senior HR Professionals across the academic and health system organizations working together to:

- share information
- scale solutions
- solve problems
S3 Meeting Group

Together, S3 members focus on:

- Providing advice and guidance on HR policy matters combining HR expertise and knowledge of University operations
- Addressing and resolving or making recommendations to University leadership when needed regarding universal issues and problems identified within the HR Community
- Informing HR community members about topics that effect their work, such as new initiatives, new or changing policy and HR best practices via the HR Community Circle or via S3 official communications

Continued…………
S3 Meeting Group

Together, S3 members focus on:

- Finding new and creative approaches for the HR Community to effectively support the success of our customers and of our HR Community membership

- Making recommendations on process in concert with the Chief Human Resources Officers in consultation with appropriate University partners

- Making policy recommendations via the Chief Human Resources Officer to the Policy Review Committee
Members of the $S^3$ are expected to:

- Make meeting attendance a priority
- Be knowledgeable of school/organization mission and business/academic operations and represents the interests of their school/organization based on this knowledge
- Consider fully how school/organization operations, HR best practice and compliance combine in order to problem solve
- Communicate with colleagues to obtain input from their perspective to inform proposed solutions
- Convey meeting highlights to management to ensure appropriate dialogue, input, and support for recommended solutions
- Be collaborative and solution-oriented with a focus on the best interest of the entire University
We anticipate that membership in the S$^3$ will change as the redesign progresses. Current members:

- **John Boswell**, Chief Human Resources Officer, Medical Center
- **Lisa Cannell**, Chief Human Resources Officer, Darden Graduate School of Business
- **Sarah Collie**, Assistant Vice President for Organizational Excellence
- **Heather Cullop**, Director of Human Resources, McIntire School of Commerce
- **Robin Fisher**, Director of Human Resources, SEAS
- **Bryan Garey**, Interim Chief Human Resources Officer, Academic Division
- **Maggie Harden**, Associate Vice Provost for Academic Administration
- **Brenda Jarrell**, Chief of Human Resources and Development, UVA Physician’s Group
- **Barbara Kessler**, Director of Human Resources, SCPS
- **Lynn King**, Assistant Vice President for Advancement, Human Resources
- **Rebecca Leinen**, Human Resource and Training Director, Facilities Management
- **Catherine Lindqvist**, Executive Director, Exec Search Group & Strategic Resourcing
- **Debbie Mincarelli**, Director of Human Resources, College & Grad School of Arts and Sciences
- **Ellen Missana**, Director of Human Resources, Curry School of Education
- **Jenn Oliver**, Director of Human Resources, School of Medicine
- **Barbara Ruddy**, Director of Human Resources, School of Law
- **Brett Schnell**, Associate Athletic Director for Human Resources
- **John Teahan**, Associate Dean for Administration, School of Nursing
- **Kathy Woodson**, Human Resources Generalist, Architecture
Ufirst awareness
The University of Virginia is transforming the way we serve our mission by putting you first. The Academic Division and Health System are joining forces. We aim to create a consistent and exceptional work experience for every UVA colleague, one that is commensurate with our reputation of excellence.
The case for transforming Human Resources (HR) at UVA has never been stronger. Outstanding HR services are crucial for the University to deliver on its mission and its strategic goals. Currently UVA faces:

<table>
<thead>
<tr>
<th>Mass retirement of existing talent</th>
<th>Systemic inefficiencies and redundancies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasingly competitive market for new talent</td>
<td>70+ disjointed systems that collect HR data and six different learning management systems across three entities</td>
</tr>
<tr>
<td>Inconsistent service experience</td>
<td>20+ employee categories governed by 152 HR policies</td>
</tr>
</tbody>
</table>
The solution

Human Resources must be focused and unwavering in its support of excellence. We aim to provide the highest quality HR services to advance the University’s mission of world-class teaching, research, patient care, and public service.

We commit to:

• A recruiting, hiring, and onboarding experience consistent with the reputation of the University

• Improved satisfaction through seamless, consistent, high-quality HR services, and experiences

• Proactive support and engagement from qualified HR professionals

• A more efficient operating model that frees up HR professionals to focus on more value-added activities
We began this HR transformation journey in early FY 2015 and it will continue for several years with full implementation expected in FY 2018. Between now and then, expect to see both incremental and punctuated improvements to HR processes, policies, and systems.

<table>
<thead>
<tr>
<th>FY 2015 / 2016</th>
<th>FY 2017</th>
<th>FY 2018+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Align HR and co-build a solid foundation</td>
<td>Get ready for change</td>
<td>Design the future</td>
</tr>
<tr>
<td>Co-build HR process models and build service components</td>
<td>Implement program changes</td>
<td>Sustain and continue to improve</td>
</tr>
<tr>
<td>Create stakeholder involvement and collaboration infrastructure</td>
<td>Enable processes and configure technology</td>
<td>Support team as they work in new ways</td>
</tr>
<tr>
<td>Build detailed business case</td>
<td>Evaluate &amp; select talent</td>
<td>Monitor and stabilize operations</td>
</tr>
<tr>
<td>Define project structure and onboard teams</td>
<td>Prepare team members for new responsibilities</td>
<td>Begin to find continuous improvement opportunities</td>
</tr>
<tr>
<td>Establish project management tools and routines</td>
<td>Test and retest solutions</td>
<td></td>
</tr>
<tr>
<td>Build integrated plan for design phase</td>
<td>Create University readiness</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Implement service delivery model</td>
<td></td>
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</tbody>
</table>

Continuous improvement opportunities:

- Engage stakeholders
- Create a shared understanding of current HR performance
- Begin with the “why” and articulate purpose/guiding principles
- Co-build a vision for future state HR service delivery
- Articulate the case for change
Ufirst project team structure

Advisory Groups
Change Champions Coalition, Design Advisory Council, EY, G40, and Organizational Excellence

Executive Sponsors
Pat Hogan, Rick Shannon, Anda Webb, Bob Pianta, Allan Stam, Virginia Evans, Bradley Haws

Project Leadership Team
John Boswell, Bryan Garey, Laura Hawthorne, Sarah Collie, Danny Ferron

Project Management Office Team
Chris Patrick, Project Coordinator

Technology Advisory Team
Virginia Evans, Rick Skinner, Sean Jackson

HR Governance
Maggie Harden
Brenda Jarrell

HR Service Delivery Design
Lisa Cannell

HR Technology
Michael Latsko
Teresa Wimmer

HR Process
Jenn Oliver, Mary Brackett

Change and Community
Ann Saudek, Ellen Missana

Business Services for HR
Barbara Kessler, Robin Fisher

Advisory Groups
Scope: EY, G40, Virginia Evans, Rick Skinner, Sean Jackson

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Technology Advisory Team
Scope: Virginia Evans, Rick Skinner, Sean Jackson

HR Governance
Scope: Maggie Harden, Brenda Jarrell

HR Service Delivery Design
Scope: Lisa Cannell

HR Technology
Scope: Michael Latsko, Teresa Wimmer

HR Process
Scope: Jenn Oliver, Mary Brackett

Change and Community
Scope: Ann Saudek, Ellen Missana

Business Services for HR
Scope: Barbara Kessler, Robin Fisher

HR Governance
Scope: Structure, Policy

HR Service Delivery Design
Scope: Centers of Expertise, HR Service Partners, HR Service Center

HR Technology
Scope: Data, Requirements & Vendor Selection, Web Experience

HR Process
Scope: One HR, Managerial Reporting, 90 day initiatives, Etc.

Change and Community
Scope: Ann Saudek, Ellen Missana

Business Services for HR
Scope: Barbara Kessler, Robin Fisher
The creation of the Chief Human Resources Officer (CHRO) & Vice President role reflects our commitment to enhancing innovation, employee engagement, productivity, health and financial well-being across the Academic Division, University Physician’s Group and Medical Center. The CHRO will elevate and establish HR as a trusted partner and strategic, integrated resource that delivers consistent service and upholds shared principles across the University.

The CHRO’s main charges include, but are not limited to:

- creating a high-performing HR team, culture with a service mindset,
- being a thought-leader at UVA and an advocate for HR,
- creating innovative ways to engage all employees,
- developing integrated talent acquisition plans, and
- ensuring that technology, processes and policies are aligned to University goals.

The CHRO will play an integral role in leading the transformation of HR and commencing the successful implementation of Ufirst by conceptualizing the final end-state and articulating the path forward to achieve that goal. The CHRO will be the architect of a new culture that empowers the University’s human capital and establishes a culture of employee engagement that connects all employees to UVA’s mission.

UVA selected Korn Ferry to lead the recruitment efforts in collaboration with the UVA Search Committee. Visit the Executive Search website for additional information on the CHRO position.
Additional information and next steps

For additional information visit the Ufirst website ufirst.virginia.edu. If you have any questions and/or comments, email the project management office at ufirst@virginia.edu.

Ufirst website information
Additional Ufirst project information on the website includes:

- Team structure
- Leadership
- News
- FAQs
- Contact information

Next steps
We will be providing updates as the project progresses and key decisions are made. Please stay tuned for further updates in Summer 2016, including:

- Early service improvements
- HR technology solution decision
- HR service delivery approach / experiences
Early Service Improvements
Early Service Improvements (ESIs)

- There is no time like the present to begin building on what HR does well.
- The UVA HR community has identified places where we can make a positive impact now! We have heard you!!
- Coordinating with our customers, our technology partners and YOU, the HR Community, we are working together to simplify and improve processes.
- These improvements are targeted at improving the employment experience, which includes making HR administration easier.
- We have identified five initial waves of improvements and have designed a collaborative implementation process.
- After introducing the current overall plan, we’d like to introduce you to the specific details of first two ESIs.
# Early Service Improvements Sequence

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
<th>Wave 4</th>
<th>Wave 5+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch to exception-based time reporting and approvals</td>
<td>Eliminate background check for internal hires</td>
<td>Leverage onboarding resources developed by UVa Charge/ESG</td>
<td>Create/ publicize unified institutional HR calendar</td>
<td>Pilot collaborative offer negotiation</td>
</tr>
<tr>
<td>Eliminate 5 day internal posting requirement</td>
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</table>

## Onboarding Activities and Logistics

- Implement interim Oracle Advanced Benefits module and make benefits descriptions more user-friendly
- Implement Salesforce for case management

## Recruiting

- Expand dual career position in Provost office to service other employee types across UVa

## Benefits

- Select and implement eLMS solution
- Provide higher value benefits advising

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**Ufirst**

Human resource solutions for you
Today...

Academic Division exempt staff are required to submit timecards on a bi-weekly basis. Timecards are either blank (no leave taken) or populated (indicating that leave has been taken). Exempt staff are only eligible for vacation payouts if all bi-weekly timecards are received for the calendar year, and if they have taken a minimum leave of 10 days.

Going forward...

“Blank timecard” submissions will no longer be required from Exempt staff.

In the future state, Exempt staff will only be required to submit a bi-weekly timecard when they use their leave, resulting in a reduction in the number of bi-weekly timecards they would need to complete and submit. Managers will no longer have to approve blank timecards.
## ESI: Timecards for Exceptions for Exempt Staff

### Benefits of this ESI

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elimination of non time value added activities</td>
<td>• Exempt staff will no longer be required to submit blank timecards</td>
</tr>
<tr>
<td></td>
<td>• Managers would no longer be required to approve “blank timecards“</td>
</tr>
<tr>
<td></td>
<td>• Managers and exempt staff will save approximately 300,000 clicks per year</td>
</tr>
<tr>
<td>Alignment of practices across the University</td>
<td>• The University Physician’s Group and the Medical Center currently employ exception-time based reporting for exempt staff</td>
</tr>
<tr>
<td>Alignment to current payroll practices of peer institutions</td>
<td>• In a survey of 20 colleges and universities, 16 require exempt staff to record only leave taken either by entry into a leave approval system or directly on a time card/time reporting system</td>
</tr>
</tbody>
</table>

**Targeted go-live date:** 5/29/16
ESI: Eliminate internal posting requirements

Today...

Positions are required to be posted internally for five days before being posted externally. This requirement has been in place for 7 years and yielded a fairly even number of internal and external hires.

Going forward...

1. The 5 day internal posting requirement will be lifted. When posted, all staff positions are immediately available to external and internal applicants.

2. In addition, the requirement to post all staff positions for 5 business days (15 business days for underutilized positions) will change to 5 calendar days (15 calendar days for underutilized positions).

3. Hiring officials will have an option to identify if a candidate is a current UVA employee (this is still under discussion).
## ESI: Eliminate internal posting requirements

### Benefits of this ESI

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alignment of practices across the University</td>
<td>The Medical Center and the University Physician’s Group currently adheres to a 5 day minimum posting that is posted concurrently internal and external.</td>
</tr>
<tr>
<td>Demonstrate synergy with Professional Research Staff and Faculty Recruitment</td>
<td>Professional Research Staff and Faculty postings both are not subjected to the current internal 5 day posting requirement.</td>
</tr>
<tr>
<td>Enhancing the University’s talent pool</td>
<td>This change in requirement provides the ability to cast a wider net. It will bring innovative ideas, different perspectives, and create a more diverse workforce.</td>
</tr>
<tr>
<td>Eliminates a waiting period to market vacancies externally</td>
<td>This change will eliminate hiring delays in cases of an unqualified pool of internal candidates by immediately opening the position to external candidates.</td>
</tr>
</tbody>
</table>

**Targeted go-live date:** 5/16/16
Vendor Selection
### The Ufirst technology journey

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2016</td>
</tr>
<tr>
<td>Dec</td>
<td>Jan</td>
</tr>
<tr>
<td>Jan 8</td>
<td>Feb 15</td>
</tr>
<tr>
<td>Feb 19</td>
<td>Mar 15</td>
</tr>
<tr>
<td>Apr 15</td>
<td>May 15</td>
</tr>
<tr>
<td>Jun 10-14</td>
<td>Jun 30</td>
</tr>
</tbody>
</table>

#### Step 1
- **RFI distributed**
  - HRSDI Technology team researched leading market solutions and identified 5 vendors (all cloud) that received a RFI.

#### Step 2
- **Vendor demos held**
  - Gathered community input from 4 vendor demos, which had 100+ attendees across the University.

- **Step 2 vehicle determined**
  - HRSDI HR Technology Review Committee reviewed HR solutions and recommended 2 qualified vendors: Workday and SAP SuccessFactors.

- **RFI/RFP responses received**
  - Received RFI/RFP responses from qualified vendors with responses to complex case scenarios.

- **Obtain Board’s funding approval**
  - TBD

- **RFI responses received**
  - HRSDI Technology team received and analyzed 4 vendor RFI responses to qualify vendor solutions.

- **Requirements finalized**
  - Collected HR solution requirements and finalized list of requirements.

- **RFI/RFP distributed**
  - Distributed a second RFI/RFP to qualified vendors with complex case scenarios.

- **Responses reviewed & final demos held**
  - Assessed HR Solution capability against defined criteria and requirements.

- **Finalize contract**
  - Finalize contracts with solution vendor and solution integrators.

**Timeline:**
- **Dec 1:** RFI distributed.
- **Jan 18 - 29:** Vendor demos held.
- **Feb 19:** Step 2 vehicle determined.
- **Apr 15:** RFI/RFP responses received.
- **Jun 10-14:** Obtain Board’s funding approval.
- **2015:**
  - Dec: RFI responses received.
  - Jan: Requirements finalized.
  - Feb: RFI/RFP distributed.
- **2016:**
  - Jan 8: Finalize contract.
  - Feb 15: Finalize contract.
UVA HR Community

- Building Relatedness
- Sharing Information
- Enrichment
Fall 2015 – Phone calls to over 150 members of the UVA HR Community to ask what community means to them. Draft community statement created.

December 2015 – Ten focus groups with over 140 people providing valuable insight to inform our community building strategy.

Focus Group Feedback Summarized and we listed and reflected on our challenges and our strengths.
The UVA HR Community Building Strategy is to facilitate trust and build a service oriented HR community by fostering:

- Communication
- Collaboration and Relatedness
- Professional Enrichment - Outstanding Team Member Experience
- Shared principles and values
You are already starting to see some specific parts of the strategy come to life:

- January 13 Community Event and the current awareness campaign.
- Our new meeting and communication structures, which will continue to evolve.
- Ufirst lunch bunch - we hope you will join us today or in the future as your schedule allows.
- HR Directory and looking at ways to foster collaboration, including use of a collaboration tool.
- Experiential learning opportunities to understand, practice and model our HR competencies which are grounded in our common principles and values.
As members of the HR Community we are committed to providing an excellent service experience and to building trust amongst one another through our common principles and values:

- We are customer and solution focused with a commitment to action.
- We respect and appreciate each other’s diverse backgrounds, expertise and unique contributions.
- We actively listen to the views of others and are open to new ideas. We seek first to understand, then to be understood.
- We recognize one another’s strengths, supporting and collaborating with each other toward excellence. We follow through, depend on each other and hold each other accountable.
- We value getting to know all members of our community and we demonstrate care for each other. We strive to exceed expectations and celebrate great work.
- We are transparent and honest in our interactions, sharing information, communicating clearly, and making fair and balanced recommendations.
- We value clearly defined expectations and goals, continuity and simplicity in processes, and leading HR practices.
- We are continuous learners and value professional development. Through our core competencies we bring discipline and value to the practice of HR.